

**NINDS**

## **Purchasing On-line Tracking System (POTS)**

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### **Outline**

- **Brief History of POTS Development**
  - What is POTS & why we need it?
- **Brief Overview of POTS v4.x**
  - Basic design and technical Architecture
  - Work flow and system features
  - NBS and external systems Integration
- **Lesson Learned and Summary**
- **System Demo**



## What is POTS?

A Purchasing On-line Tracking System that is used for any types of purchase orders submission, approval, **tracking and management**

*Currently 26 ICs at NIH are using POTS!*

**Not a contract bids or quotes management system;**  
*although these can be accomplished by integrating with Sharepoint or other repository systems; e.g. a separate web site for vendor to submit proposals/bids!*

## Why We Need POTS?

*(What problems are we trying to solve?)*

- **End Users (Requester):**

- Issues with paper-based procurement process (lost orders, late orders, wrong items ordered, duplicated orders, double charged, wrong delivery, vendors not getting paid, etc.)
- No tracking of order status (*where is my order?*)
- No consistent communication between requesters and purchasing agents (PA) (i.e. finger pointing)
- No central management of purchase requests/orders (*PA out of office!*)
- Manual and duplicate data entry into financial management system (NBS)!

- **Purchasing Agents:**

- No easy or consistent ways of complying and enforcing procurement policies and regulations (e.g. can we buy this or mandatory sources)
- Keep track of PO and contract awards, delivery dates, back orders, receiving and invoices

- **Management:**

- Difficult to manage year-end close out and staff workload and performance
- No transparency and control over spending limits or allocated budget
- Spending trend analysis (level 3 and vendor data) and procurement audits!

## Basic POTS System Features?

- Cross platform (Web-based) internet application (PC, Mac and Unix)

- **Requesters** can...

- Submit the order thru a simplified electronic form
- Attach (upload) electronic competitive quotes
- Do on-line receiving for faster payment and closure of orders
- Check order status and progress at any time
- Be able to copy orders for repetitive ordering
- Be notified via emails about orders status and if any problems

- **Approvers** can...

- Receive emails and approve orders online with few simple clicks
- Check status and summary of budget reports

- **Purchasing Agents** can...

- Review and process orders on-line; update order status
- Print NH1861 forms in PDF for audit if needed
- Send back orders with comments if questions/problems
- Auto-alert if new orders not processed over 5 business days
- Chief can re-assign work orders if needed or PA out of office
- Send orders directly into NBS to avoid double data entry

[illegible]

# Current POTS 4.0 User Interface

## POTS User “My Order” Screen

★ : Approver Pending (New)
⚡ : Approver Pending for more than 7 days
🔴 : In Progress
🟢 : Sent to NBSA
🔵 : Completed
🔴 : Closed
⚠ : Emergency

Search POTS # (enter full or partial):

My orders or orders by CAN:  Fiscal Year: 2011

View Mode:

**RRP : Requester Receiving Partial**  
 **RAF : Approver Receiving Partial**  
 **RPP : PAIP-Card Holder Receiving Partial**  
 **RDP : Other CAN Member Receiving Partial**  
**RRF : Requester Receiving Complete**  
 **RAF : Approver Receiving Complete**  
 **RPF : PAIP-Card Holder Receiving Complete**  
 **RDF : Other CAN Member Receiving Complete**

\*\* Downloading entire data in "All Pages" mode could take several minutes.  
 \*\* Non-requester/preparer can only view as a CAN member for viewing, copying, and add/receiving.

Page 1 of 3   Go to page

Action	Emergency	POTS #	Requester	Preparer	CAN	Vendor	Total	Submit/Save Date	Apprv Date	Approver	AD Apprv Date	AD Apprv By	PA/CCH	Status	Recv	NBS Req	NBS PO
✕		11-012400	Fann, Yang	Panosasian, Jack	8336555			8/28/2011		Fann, Yang				PI Send Back			
🔵		11-012113	Fann, Yang	Panosasian, Jack	8336555			9/12/2011	9/12/2011	Fann, Yang	9/13/2011	Dean	Panosasian, Jack	Closed	RAF	P-Card#2281065	2328763
🔵		11-012067	Fann, Yang	Panosasian, Jack	8336555			9/12/2011	9/12/2011	Fann, Yang	9/12/2011	Dean	Panosasian, Jack	Closed	RAF	P-Card#2278269	2324762
🔵		11-011620	Fann, Yang	Fann, Yang	8336555			8/26/2011	8/26/2011	Fann, Yang	8/26/2011	Dean	Smith, Gloria	PA Ordering Completed		P-Card#2272431	2317489
🔵		11-011614	Fann, Yang	Fann, Yang	8336555			8/26/2011	8/26/2011	Fann, Yang	8/26/2011	Dean	Smith, Gloria	PA Ordering Completed		P-Card#2272456	2317518
🔵		11-011359	Fann, Yang	Panosasian, Jack	8336555			8/24/2011	8/24/2011	Fann, Yang	8/24/2011	Dean	Panosasian, Jack	OCH Ordering Completed		P-Card#2250057	2294334

## POTS User Order Detail Screen I

🏠 🛒 🔍 👤 ? 📧 🔒

**POTS** NINDS 4.1.7  
 Purchasing Online Tracking System

Fann, Yang  
2/28/2012 12:40:11 PM

NATIONAL INSTITUTE OF NEUROLOGICAL DISORDERS AND STROKE

[Home](#)  
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POTS #: 11-012113  
User Role: Requester

Order Status: Closed  
 Receiving Status: Received Full  
 NBS Status: Sent To NBS (Please See NBS Event History)

Nbs Messages Close

Date	NBS Event	NBS Message / Notes
09/13/2011 12:19 PM	NBS Response	Requisition accepted by NBS, Req #: 2281065
09/13/2011 12:18 PM	NBS Response	Award created. PO #: 2328763
09/13/2011 12:17 PM	Sent To NBS	Requisition sent successfully...

Receiving

Date Received	Receiver	Status	Has PA/CCH Notes	Attachment	
10/11/2011	Jack Panossian	Complete	No		<input type="button" value="view"/>

## POTS User Order Detail Screen II

Item #	Item Info	Qty	List Price	Disc Price	Sub Total
1	CAN #: 8012232 Custodial Code: 80028 Expenditure Type/OC: 266A -- ADP Supplies Category #: 7045 -- ADP SUPPLIES Description: Magenta C9723A Units: EACH Catalog#: Mgmt C9723A GSA Schedule: No Cost Item: NBS Requisition #: BPA Call/TODO #:	1	\$213.42	\$213.42	\$213.42
<b>Total:</b>					<b>\$213.42</b>

Is this order section 508 compliant?

☐ Yes ☐ No ☒ N/A

Section 508 Justification\*

Approval Information Show Details...

Miscellaneous... Hide Details...

Please click on the checkbox below to indicate if your order complies with "Environmentally Preferable Purchasing (EPP)":

☒ Yes ☐ No ☒ N/A (Help? What is EPP?)

To find and evaluate Environmentally Preferable Purchasing (EPP) please visit: <http://www.epa.gov/epp/>

## POTS Chief PA Reassign Order Screen

★ New
🕒 Pending for more than 7 days
🟡 In Progress
🟢 Number of Order: 301

Set	Emgc	POTS #	Requester	CAN	Vendor	Total	Date Needed	Apprv Date	Apprv By	AO Apprv Date	AO Apprv By	Assigned PA/CCH	Status																								
<input checked="" type="checkbox"/>		11-008531	Dorsey, Denise	8326424			6/23/2011	6/20/2011	Sotranko, Mary Ann	6/20/2011	Dorsey, Denise	Dorsey, Denise	PA Pending																								
Reassign To: <input checked="" type="radio"/> PA <input type="radio"/> CCH Select a new PA: Kelly Baker Make this PA permanent for future orders: <input type="checkbox"/> <input type="button" value="Update"/>																																					
Reassignment History <table border="1"> <thead> <tr> <th>Date</th> <th>From</th> <th>To</th> <th>Reassigned By</th> </tr> </thead> <tbody> <tr> <td>6/23/2011</td> <td>6/16/2011</td> <td>Jiang, Xiaohui</td> <td>6/16/2011</td> </tr> <tr> <td>1/11/2012</td> <td>1/5/2012</td> <td>Soltys, Peter</td> <td>1/5/2012</td> </tr> <tr> <td>9/28/2011</td> <td>9/22/2011</td> <td>cimsuser, cimsuser</td> <td>1/1/1900</td> </tr> <tr> <td>9/28/2011</td> <td>9/22/2011</td> <td>cimsuser, cimsuser</td> <td>1/1/1900</td> </tr> <tr> <td>9/28/2011</td> <td>9/22/2011</td> <td>cimsuser, cimsuser</td> <td>1/1/1900</td> </tr> </tbody> </table>														Date	From	To	Reassigned By	6/23/2011	6/16/2011	Jiang, Xiaohui	6/16/2011	1/11/2012	1/5/2012	Soltys, Peter	1/5/2012	9/28/2011	9/22/2011	cimsuser, cimsuser	1/1/1900	9/28/2011	9/22/2011	cimsuser, cimsuser	1/1/1900	9/28/2011	9/22/2011	cimsuser, cimsuser	1/1/1900
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9/28/2011	9/22/2011	cimsuser, cimsuser	1/1/1900																																		
<input checked="" type="checkbox"/>		11-008523	JOHNS, Clark	8390866			6/23/2011	6/16/2011	Jiang, Xiaohui	6/16/2011	Ike, Gloria	Phillips, Lisa	PA Pending																								
<input checked="" type="checkbox"/>		12-000007	Nguyen, Hanh	8326416			1/11/2012	1/5/2012	Soltys, Peter	1/5/2012	cimsuser, cimsuser	shanvirala, srindev	PA In Progress																								
<input checked="" type="checkbox"/>		11-008625	cimsuser, cimsuser	8373737			9/28/2011	9/22/2011	cimsuser, cimsuser	1/1/1900	cimsuser, cimsuser	cimsuser, cimsuser	PA In Progress																								
<input checked="" type="checkbox"/>		11-008623	cimsuser, cimsuser	8373737			9/28/2011	9/22/2011	cimsuser, cimsuser	1/1/1900	cimsuser, cimsuser	cimsuser, cimsuser	PA In Progress																								
<input checked="" type="checkbox"/>		11-008622	cimsuser, cimsuser	8373737			9/28/2011	9/22/2011	cimsuser, cimsuser	1/1/1900	cimsuser, cimsuser	cimsuser, cimsuser	PA In Progress																								

## POTS Workflow Manager

### Workflow Manager

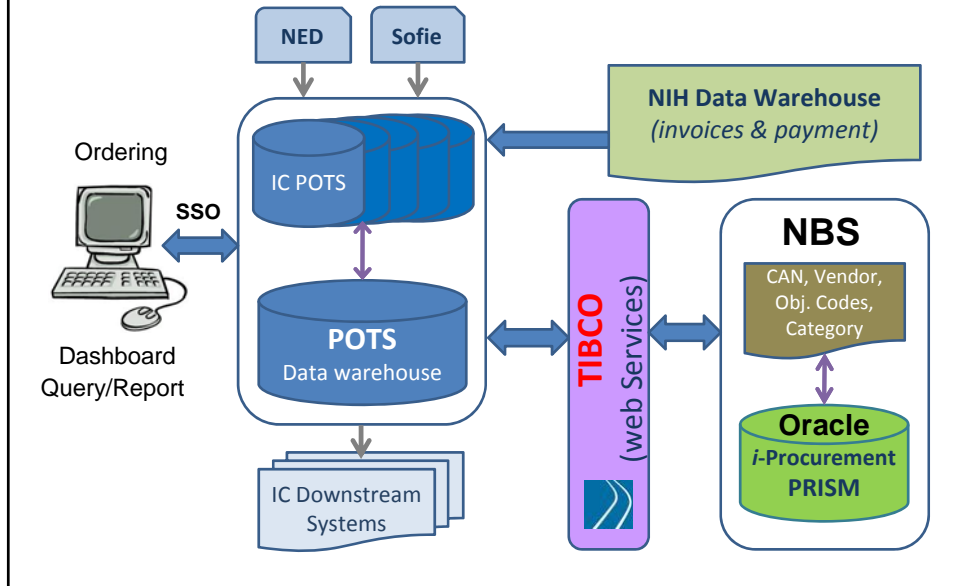
#### Existing workflow

Action	Workflow	Code	Active	Div.	CAN	Order Type	Total Amt. greater than	PCard	Start Date	End Date	Next FY Orders	Routing Steps
<a href="#">Edit</a>	BB-[Req-PI-AO-CCH]	BBO		DIR	ALL	BBO	0	Don't Care				<a href="#">Detail</a>
<a href="#">Edit</a>	BB-[Req-PI-AO-CCH]	BBO - OD/D		ALL	ALL	BBO	0	Don't Care				<a href="#">Detail</a>
<a href="#">Edit</a>	Req-App-AO-IT-PA	ITOPCARD3K		ALL	ALL	ITO	3000	Yes				<a href="#">Detail</a>
<a href="#">Edit</a>	Req-PI-AO-CCH (Default)	PCARD		ALL	ALL		0	Yes				<a href="#">Detail</a>
<a href="#">Edit</a>	Req-PI-AO-CCH (IT Order)	ITOCCH		ALL	ALL	ITO	0	Yes				<a href="#">Detail</a>
<a href="#">Edit</a>	Req-PI-AO-PA (Default)	PA		ALL	ALL		0	No				<a href="#">Detail</a>
<a href="#">Edit</a>	Req-PI-AO-PA (IT Order)	ITOPA		ALL	ALL	ITO	0	No				<a href="#">Detail</a>
<a href="#">Edit</a>	Req-PI-AO-PA (PCard > 3k) (Default)	PCARD3K		ALL	ALL		3000	Yes				<a href="#">Detail</a>
<a href="#">Edit</a>	Req-PI-AOC-IT-PA	AOC3KIT		ALL	ALL	ITO	0	Don't Care	8/27/2011 12:00:00 AM	10/1/2011 12:00:00 AM		<a href="#">Detail</a>
<a href="#">Edit</a>	Req-PI-AOC-PA	AOC		ALL	ALL		0	No	8/27/2011 12:00:00 AM	10/1/2011 12:00:00 AM		<a href="#">Detail</a>
<a href="#">Edit</a>	Req-PI-AOC-PA (PCARD > 3000)	AOC3K		ALL	ALL		3000	Don't Care	8/27/2011 12:00:00 AM	10/1/2011 12:00:00 AM		<a href="#">Detail</a>
<a href="#">Edit</a>	Req-PI-BA-CCH	SPECCH		ALL	ALL	SPE	0	Yes				<a href="#">Detail</a>

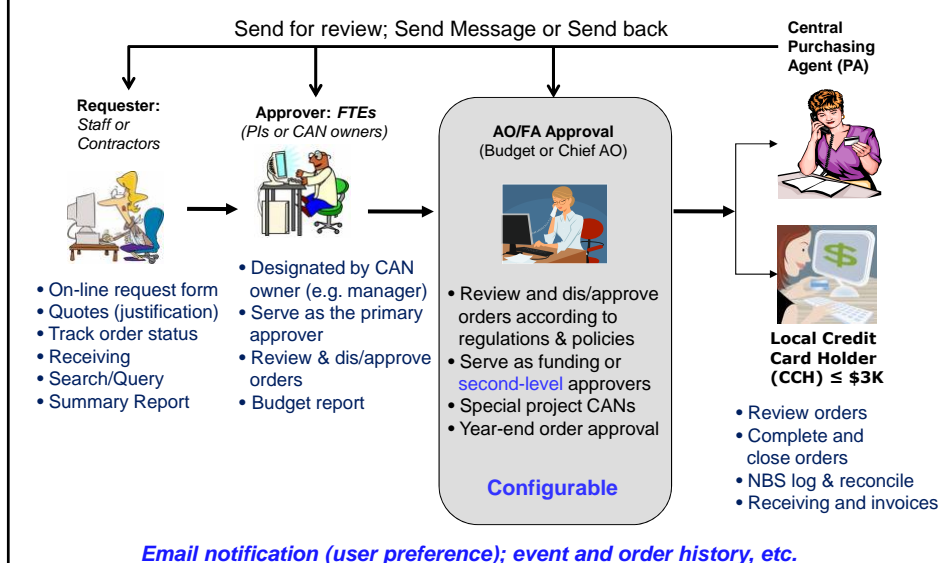
## Current POTS System Requirements

- Web Browsers (IE, Firefox, Safari, and Chrome)
- Use NIH Single Sign-On/PIV Card Login (https):
  - AD account & password
  - HSPD-12 PIV card (with PIN)
- User Profile (NIH NED integrated)
  - Predefined roles (Approver, AO, CCH, PA, etc.)
  - Roles and CANs level access control
- Development and Database Technology:
  - IIS/MS SQL/.NET, C#
  - Web services (e.g. TIBCO) for data integration

## NIH POTS System Architecture



## POTS Configurable (Division-level) Work Flow





## POTS – Roles Based Access Control

- **Requester:** The requester is assigned to common account numbers (CAN) and authorized to enter a order (for themselves or on behalf of someone else)
- **Approver:** The person who is authorized to approve the purchases on the CANs (e.g. PIs or managers). **The approver must be a federal employee.**
- **Chief AO or Budget Approver:** The person who is responsible for second level approving or for year-end, special equipment or large contract purchases.
- **Computer (IT) Reviewer:** reviews or approves IT and computer related orders.
- **PI or Chief** is the CAN owner responsible for all purchases placed in POTS. By default, PI or Chief is granted with the requester and approver roles.
- **P-Card Holder/Purchasing Agent (PA):** The employee who is responsible for placing the orders, updating the order status, payment and sending data to NBS. Chief PA can process and reassign any orders
- **View-all-only:** The person is granted to view all orders for reporting and tracking purposes such as property and management staff.
- **System Admin:** administrator for maintaining and updating user profiles, access control and CAN list as well as running various management reports.

## POTS User Access Control

User Profile

Division

User CAN Access

Order History

NBS Role

Delete User

Edit User Profile

Cancel

User Name

First Name

Title

Room Number

Telephone Number

Lab Code

Deliver To Location

Lock Box#

Administrator

Admin Officer (AO)

Chief AO (AOC)

Budget Analyst (BA)

Wireless Manager

PCard Holder (CCH)

IT Reviewer

CAN Owner

Purchasing Agent (PA)

LAB Approver (PI)

Requester

Viewer

: fann

: Yang

: IT Director

: 5S227

: 301-451-5153

:

: BLDG 10, 5S, BETHMC

:

: ✓

: ✗

: ✗

: ✗

: ✗

: ✓

: ✓

: ✗

: ✓

: ✓

: ✓

: ✓

Email Address

Last name

Building Number

Non FTE

NIH Badge Id

NIH OU Name

NIH SAC

Active

: fann@ninds.nih.gov

: Fann

: 10

: No

:

:

:

: Yes 

NED Validation

User Profile

Division

User CAN Access

Order History

NBS Role

Select CAN

ADD User To CAN

CAN	Default CAN	Lab Approver	Admin Officer	PI Branch Chief	Budget Approver	Business Office	viewonly	Edit	Delete
8012285	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8012234	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8012233	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8012232	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8012231	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8378144	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8337039	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8387460	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8382818	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9273739	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### POTS Manage CAN Screen

Select CAN : Select Can Add New Can View All Cans

Search CAN:

**Can Number \*** 1414145

**Can Owner \*** Wang, Gladys

**Assigned PA** cimsuser, cimsuser

**AO** cimsuser, cimsuser

**Custodial Code \*** 00201 Custodial Code Look Up

**Project No.**

**Description** Test1

**Organization/Exp. Org. \***

**Div/Branch \***

**SAC Code**

**Disable CAN** ☐

**Special CAN** ☐

**Division \*** DIR

Update
Cancel

### Search POTS Orders and Report

#### Search Order

**POTS ID**

**CAN(Project #)** -Select CAN-

**Requester Last Name**

**PA First Name**

**PA Last Name**

**Vendor Name** sigma

**Fiscal Year** 2008

**Requisition #**

**Order No (PO#)**

**Catalog #**

**NBS Type** -Select NBS Type-

**Order Status** -Select Order Status-

**Include Credit Card Order** ☒ Yes ☐ No

**Division** ☒ All ☐ DIR ☐ DER ☐ OD

**Order Date**

**Start Date**

**End Date**

**Order Amount**

**Min Amount**

**Max Amount**

**Advance Search**

**Item Description**

**PA Note**

**Lab Note**

**Object Code/Exp Type**

Search
Reset

**Search Result**

**Result Number**

**Total Amount:**

Printable Vi

1 2 3 4 5 6 7 8 9 10 ...													
POTS #	CAN	Preparer Name	Requester Name	Approver Name	Vendor	NBS Type	Requisition #	PO #	PA/CCH Name	Total Amount	Fiscal Year	Order Date	OS
<input checked="" type="checkbox"/>	08-010014	8336832	Claudia Gerwin	Claudia Gerwin		Sigma-Aldrich			Pam Murray	\$67.58	2008	9/30/2008	AD

## Monthly Order Summary Report by PA

for staff workload and performance

PA Name	Total	October - 2005	November - 2005	December - 2005	January - 2006	February - 2006	March - 2006	April - 2006	May - 2006	June - 2006	July - 2006	August - 2006	September - 2006
	121 +	8 +	16 +	11 +	8 +	4 +	14 +	8 +	8 +	7 +	8 +	18 +	11 +
	1219 +	154 +	85 +	113 +	116 +	118 +	96 +	77 +	104 +	70 +	96 +	149 +	41 +
<\$2,500 = 1103 Orders				72 +	65 +	71 +	72 +	60 +	89 +	91 +	84 +	52 +	24 +
Between \$2,500 & \$10,000 = 76 orders													
>\$10,000 = 40 orders				53 +	35 +	41 +	75 +	43 +	94 +	66 +	32 +	78 +	21 +
	638 +	- N/A -	- N/A -	- N/A -	54 +	67 +	97 +	67 +	88 +	97 +	61 +	81 +	25 +
	966 +	126 +	78 +	81 +	79 +	61 +	92 +	68 +	20 +	69 +	101 +	153 +	38 +
	661 +	71 +	57 +	42 +	40 +	42 +	63 +	33 +	68 +	44 +	69 +	106 +	26 +
	378 +	123 +	77 +	47 +	81 +	48 +	2 +	- N/A -	- N/A -	- N/A -	- N/A -	- N/A -	- N/A -
	1059 +	89 +	30 +	77 +	72 +	75 +	107 +	79 +	139 +	84 +	102 +	163 +	42 +
	1764 +	114 +	156 +	152 +	189 +	93 +	107 +	107 +	188 +	202 +	193 +	216 +	47 +
	729 +	71 +	92 +	37 +	65 +	58 +	82 +	43 +	52 +	47 +	52 +	98 +	30 +
	643 +	- N/A -	- N/A -	1 +	58 +	78 +	96 +	91 +	68 +	93 +	83 +	43 +	31 +

## FY Vendor Spending Report

for volume discount and budget spending analysis

Vendor Name	Contact Name	Address 1	Address 2	Address 3	Total Spending for Card Purchase	Total Spending for Non Card Purchase	Total Spending
		Magnex Scientific Products	3120 Hansen Way - W/S D-150	Palo Alto, CA, 94304			
		Pathology Associates (PAI)	15 Worman's Mill Ct, Ste 1	Frederick, MD 21701			
		13840 Grey Colt Drive	North Potomac, MD 20878				
		8600 Old Georgetown Road	Bethesda, MD 20814				
		P.O. Box 640944	Pittsburgh, PA 15264-0944				
		251 Ballardvale Street	Wilmington, MA 01887				
		2350 Qume Drive	San Jose, CA USA 95131				
		14150 NEWBROOK DR, STE 210	CHANTILLY, VA 20151				
		3030 Laura Lane, Suite 140	PO Box 620677	Middleton, WI 53562-0677			
		14150 Newbrook Drive	Suite 210	Chantilly, VA 20151			
		ATTN: MARK WALKER	1600 FARADAY AVENUE	CARLSBAD, CA 92008			
		3500 Corporate Parkway	Center Valley, PA	18034			
		ATTN: SHARON COGLE	6660 SANTA BARBARA ROAD, #19	ELKRIDGE, MD 21075			
		15 Fortune Drive	Billerica, MA 01281				

## POTS Knowledge Base and On-line Tutorial

# POTS Tutorial

POTS User Community Resources

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[Video Tutorial](#) | [Document](#) | [Online Tutorial](#)

[Home](#) | [Document](#)

### Document

Posted on Monday, March 01, 2010 by Administrator

- [Instruction How to Send Order to NBS](#)
- [Requester User Guide POTS 4.0 \(New\)](#)
- [How to Open POTS using Firefox](#)
- [Adhoc Query User Guide](#)

#### Search Box

#### Useful Links

- [NIH](#)
- [NINDS Intramural](#)
- [NIH IT Helpdesk](#)

#### POTS IC Links

- [POTS NINDS](#)
- [POTS NIDDK](#)
- [POTS NHGRI](#)
- [POTS NHLBI](#)
- [POTS NIDCD](#)
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## NBS Web Services Management

### Manage NBS Lookup

Object Class	UOM	Item Category	Standard Property Description	NAICS Code
Object Classes <a href="#">Add New</a>				
<a href="#">Move Up</a>	<a href="#">Move Down</a>	0	2241 Shipping	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	1	2292 Office Move	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	3	233A ADP EQUIPMENT RENTAL	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	4	2513 Mgmt Suppl/Study-Evaluations	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	5	252H Lecturers/Speakers	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	6	252Q Ad Hoc Reviewers	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	7	252V Ad-Publications	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	8	252W Tuition-Registration	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	9	252Z All others 51	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	10	2576 Repairs-Scientific Equipment	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	11	257N Maintenance Contracts	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	12	257P ADP Licenses	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	13	257W OTHER IT (ADP AND TC) SOFTWARE & HARDWARE SERVICES	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	14	2613 Biological Products	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	15	2614 Tissue Products	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	16	2616 Media Products	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	17	2618 Blood Products	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	18	263A Medical-Surgical Supplies	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	19	2651 Lab Supplies	<a href="#">Remove</a>
<a href="#">Move Up</a>	<a href="#">Move Down</a>	20	2652 Chemicals	<a href="#">Remove</a>

## POTS Data Integration with Sofie ( for budget management)

“Real-time” budget reporting by CAN

PURCHASING ONLINE TRACKING SYSTEM

User: fann  
Logged in: 02/19/2010 07:29 PM

National Institute of Neurological Disorders and Stroke

Home | Search Orders | Requester | Viewer | Approver | Admin Officer | Chief AG | Budget Analyst | IT Reviewer | Purchasing Agent | P-Card Holder | Administrator | Vendors | Support | User Guide

Manage Users | Manage Vendors | Manage CANs | Fiscal Year End Settings | Reassign Approvers | Reports | Feedbacks | Account Request Forms | Email Log | Manage NBS Lookup | Manage POTS Configuration

100% Find | Next Select a format Export

CAN	YTD POTS orders	YTD POTS spending	# of pending POTS orders	Pending POTS orders total (A)	Sofie YTD obligation + commitment (B)	Sofie budget allocation (C)	Sofie budget balance	POTS budget balance (C-(B+A))
8360796	68	\$7,075.18	3	\$625.00				
8360921	82	\$21,046.44	4	\$820.50				
8364138	126	\$225,769.18	8	\$4,960.61				
8364139	1	\$450,000.00	0	\$0.00				
8365224	47	\$3,221.18	0	\$0.00				
8365224	47	\$3,221.18	0	\$0.00				
8365756	47	\$5,431.66	2	\$3,471.38				
8366100	10	\$1,446.00	0	\$0.00				
8366284	67	\$65,501.58	0	\$0.00				
8366285	6	\$10,500.00	0	\$0.00				
8366299	3	\$250,000.00	0	\$0.00				

## POTS Management and Support Dashboard

Showing all Daily Real-time Transactions to NBS

POTS DASHBOARD

Production Test

POTS Number Search: Submit

Click to select day(s): July 2010

or Search Submission Date: Start Date: 7/9/2010 End Date: 7/9/2010 Submit

POTS Management Dashboard

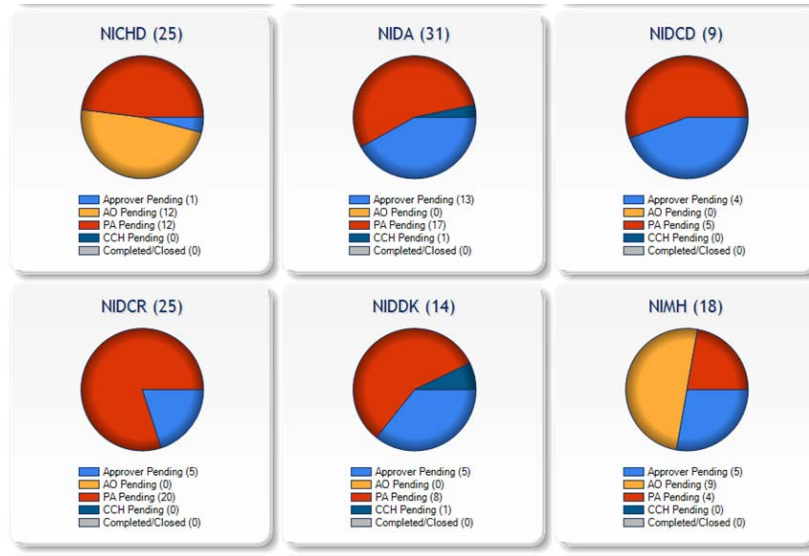
No. of Submissions: 444

1 2 3 4 5 6 7 8 9 10

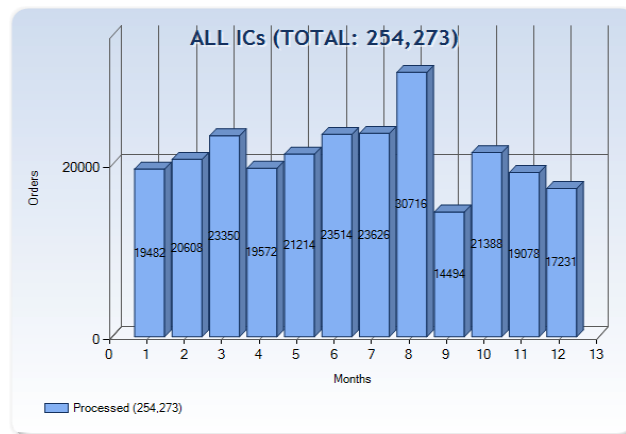
Printable View

#	IC	POTS ID	Submission ID	Submission Location	Submission Time	Requester	Response Time	Status	Basic Status	Requester #	PO #	Rept #	Sync Response Time	Response Time	System Name	NBS History
1	NCI	10-018605	2010018605		7/9/2010 1:30:55 PM			Succeed	BECKER, JOAN				7/9/2010 1:30:56 PM		P	
2	NCI	10-018625	2010018625		7/9/2010 1:30:15 PM		7/9/2010 1:32:54 PM	Succeed	FULLEY, MA	1688670			7/9/2010 1:30:17 PM	00:02:39	FR	
3	NCI	10-019742	2010019742		7/9/2010 1:22:11 PM		7/9/2010 1:25:24 PM	Succeed	MELO, Lisa	1688646	1701148		7/9/2010 1:22:12 PM	00:01:13	P	
4	NCI	10-018438	2010018438		7/9/2010 1:20:10 PM		7/9/2010 1:21:49 PM	Succeed	BECKER, JOAN	1688640	1701138		7/9/2010 1:20:11 PM	00:01:39	P	
5	NCI	10-020323	2010020323		7/9/2010 1:18:29 PM		7/9/2010 1:19:59 PM	Succeed	CYPHERS, JOHN	1688634	1701135		7/9/2010 1:18:31 PM	00:01:30	P	
6	NCI	10-010300	2010010300		7/9/2010 1:18:06 PM		7/9/2010 1:18:14 PM	Succeed	BECKER, JOAN	1688633	1701133		7/9/2010 1:18:08 PM	00:01:00	P	
7	NCI	10-019739	2010019739		7/9/2010 1:17:37 PM		7/9/2010 1:18:24 PM	Succeed	ELLIOTT, KATHY	1688630	1701129		7/9/2010 1:17:41 PM	00:00:47	P	
8	NCI	10-018379	2010018379		7/9/2010 1:15:49 PM		7/9/2010 1:16:52 PM	Succeed	BECKER, JOAN	1688624	1701125		7/9/2010 1:15:50 PM	00:01:03	P	
9	NCI	10-018300	2010018300		7/9/2010 1:13:39 PM		7/9/2010 1:15:44 PM	Succeed	BECKER, JOAN	1688621	1701122		7/9/2010 1:13:40 PM	00:02:05	P	
10	NCI	10-020863	2010020863		7/9/2010 1:13:36 PM		7/9/2010 1:15:49 PM	Succeed	WILLIAMS, LATOYA	1688622	1701123		7/9/2010 1:13:39 PM	00:02:13	P	
11	NCI	10-018183	2010018183		7/9/2010 1:11:57 PM		7/9/2010 1:13:29 PM	Succeed	BECKER, JOAN	1688616	1701118		7/9/2010 1:11:59 PM	00:01:32	P	
12	NCI	10-020892	2010020892		7/9/2010 1:07:40 PM		7/9/2010 1:08:39 PM	Succeed	NOUYEN, PHU	1688610	1701108		7/9/2010 1:07:42 PM	00:00:59	P	

## IC POTS Real-time Daily Order Status Summary



## Number of IC Orders Processed thru POTS (2011)



***It costs < \$0.95 to support processing an order in POTS!***

## POTS Experience and Lesson Learned

- Currently used by most ICs at NIH and hosted by NINDS in the Clinical Center data center; system C&A signed by NIH CISO and CIO!
- ***Technology may not always solve business (or people) problems!***
- Gain support from the management and build user community trust
  - Convey “Change (to use POTS) is GOOD!” message
- Deployment strategy and planning –
  - Set internal policies for approval process and access controls (e.g. needs AO – second level approval for every order??)
  - Conduct user, purchasing agent and credit card holder (CCH) trainings
  - Set up IC POC for application support, contact, and user feedback
  - Coordinate with Helpdesk and IT support staff for application launch
- **Communication and engage** with the user community!

## Why POTS is Successful at NIH?

- e-gov initiatives (paperless) with a simple and innovative IT solution
- Streamline and automate administrative services to reduce burdens for scientists and support staff
- “Share” benefits and best practices within NIH and across the larger HHS community
  - Help other institutes with their challenges like yours
  - Share experiences (challenges and solutions)
  - Demo the benefits to the management
  - If any doubt, set up small pilot groups to test out
- Gain trusts and build consensus for common good (goals) (e.g. NBS and data warehouse integration - 26 voices as one!)
- POTS user committee: members from each IC working as a team (community) with equal contribution and recognition

## POTS System Key Benefit Summary

**Communication:** The system provides better communication (e.g. via email notification and real-time status updates) to end users, by allowing electronic order submission, approval, processing and receiving.

**Collaboration:** POTS is supported by a strong user community spanning 26 NIH institutes and Centers, where we share our best practices and experiences; it is simultaneously a grass-roots system designed by and for its users.

**Transparency:** POTS documents purchase details, allowing management to review orders for compliance and accountability; the procurement data can also be used for reverse auctions, volume purchases, spending trends analysis and funds control.

**Accountability:** Every action performed is recorded in the order history for accountability, performance metrics, and workload evaluation. It is also worth noting that every computer and equipment purchase is tracked and accounted

for in POTS, thereby aiding in our assets management.

**Efficiency and Cost Saving:** POTS streamlines the procurement process and allows purchasing staff to send requisitions directly into NBS without requiring double entry, thereby enhancing productivity and efficiency. Over 20,000 orders are sent each month, saving at least \$1.2 million a year in labor costs. This greater efficiency has also allowed many ICs to process more orders with less staff and to funnel their savings into research rather than administration to better support the NIH mission.

**Compliance:** The system has built-in business rules for mandatory sources, green purchases and Section 508 compliance checks to meet federal procurement regulations and policies. It is also a “green” system which stores complete electronic records of every NIH purchase.

***“A dollar saved is a dollar more for supporting biomedical research toward finding cures and improving the nation’s health!”***

## Any Question?

***Please Contact***

***Dr. Yang Fann ([fann@ninds.nih.gov](mailto:fann@ninds.nih.gov))***